


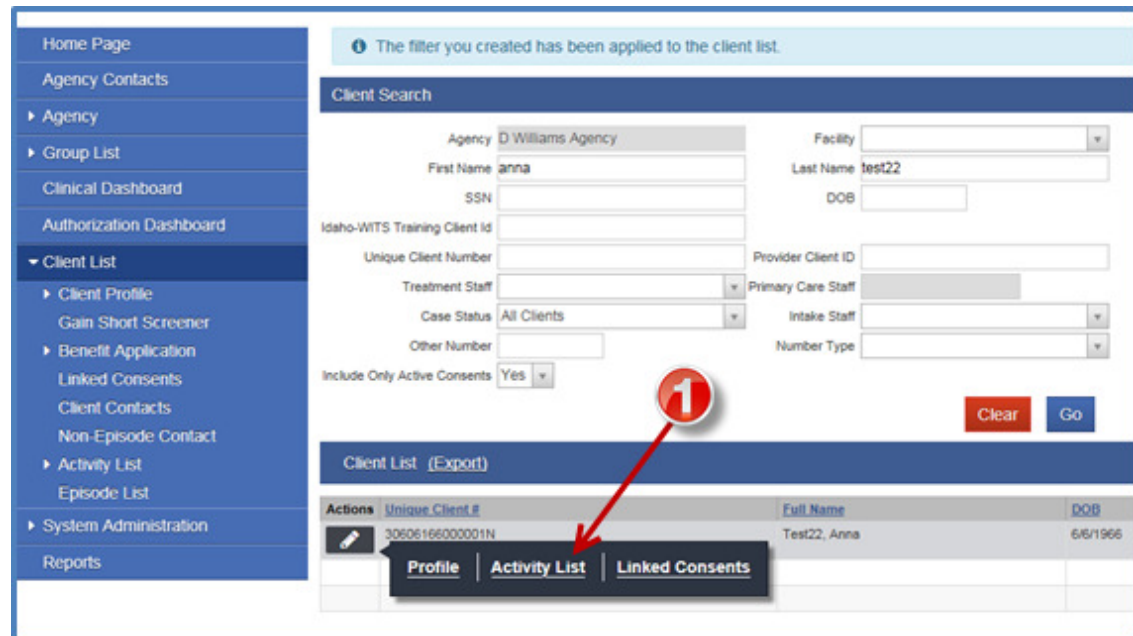
Documenting and Billing Unsuccessful Follow Up Attempts for DHW and IDJC Clients

NOTE:

- Clients must sign an informed consent specific to outcome data collection located on the WITS website [here](#).
- Do not complete a Follow Up for an ATR funded client.

Complete an Unsuccessful Follow Up

1. **Getting here:** Login, click **Client List** on the Navigation Pane (left menu) to generate the Client Search Screen, locate the client name and hover over  under Actions and click **Activity List**.



The filter you created has been applied to the client list.


Client Search

Agency: D Williams Agency
First Name: anna
SSN:
Idaho-WITS Training Client Id:
Unique Client Number:
Treatment Staff:
Case Status: All Clients
Other Number:
Include Only Active Consents: Yes

Facility:
Last Name: test22
DOB:
Provider Client ID:
Primary Care Staff:
Intake Staff:
Number Type:

Clear Go

Client List (Export)








Actions	Unique Client #	Full Name	DOB
	30606166000001N	Test22, Anna	6/6/1966

Profile Activity List Linked Consents

2. Hover over  under Actions and click **Review** to review the Episode of Care.

Episode List							
Actions	Case #	Status	Facility	Intake By	Intake Date	Closed Date	Latest PE
	1	Closed	Williams Treatment	Van Skike, Anna	5/25/2016	7/1/2016	Williams Treatment/Ado
Review							

3. Click **Follow Up** on the Navigation Pane (left menu) under the Activity List.

Client Activity List				
Actions	Activity	Activity Date	Created Date	Status
	Client Information (Profile)	5/25/2016	5/25/2016	Completed
	Intake Transaction	5/25/2016	5/25/2016	Completed
	Admission	5/25/2016	5/25/2016	Completed
	Client Program Enrollment (Adolescent Intensive Outpatient)	5/25/2016	5/25/2016	Completed
	Encounter Summary	5/25/2016	5/25/2016	Completed
	Discharge	7/1/2016	7/1/2016	Completed
	Diagnosis Summary	7/1/2016	5/25/2016	Not Applicable

- Home Page
- Agency Contacts
- Agency
 - Group List
- Clinical Dashboard
- Authorization Dashboard
- Client List
 - Client Profile
 - Gain Short Screener
 - Benefit Application
 - Linked Consents
 - Client Contacts
 - Non-Episode Contact
 - Activity List
 - Intake
 - Fee Determination
 - Wait List
 - Screening
 - Assessments
 - ASAM
 - Diagnosis List
 - Admission
 - Program Enroll
 - Encounters
 - Notes
 - Treatment
 - Follow-up**

NOTE: Update all contact information for the client as applicable.

4. Click Add New Annual Update Record.

Follow-Up List

Add New Annual Update Record

Actions	Follow Up Type	Follow Up Status	Discharge Date	Follow Up Date

Addresses

Add Address

Actions	Address Type	Address	Confidential	Created	Updated
	Client Home	123 Test St Boise, ID 83702	No	5/25/2016	5/25/2016

Current Collateral Contacts

Add New Contact

Actions	Type	Name	Address	Phone

5. Select the **Follow Up Type** and the **County of Residence**.
6. Select a **Follow Up** Status from the list below indicating why the Follow Up survey was not completed:
 - **Unable to Follow-Up-Awaiting Response**
 - **Unable to Follow-Up-Incarcerated**
 - **Unable to Follow-Up-Transferred**
 - **Unable to Follow-Up-Unable to Contact**
7. **Complete all fields.**

NOTE: Document four (4) unsuccessful attempts to contact client to complete Follow Up survey before proceeding to bill for the unsuccessful attempts.

8. Click **Save** and **Finish**.

NOTE: When there are 3 Follow Ups with the status of Unable to Follow-Up Awaiting Response and a 4th Follow Up is entered with a status of Unable to Contact, WTIS will automatically open the Intake and create the Follow Up Program Enrollment.

The screenshot shows the 'Follow Up Profile' form with the following fields and values:

- Follow Up Type:** 12 Month (Callout 5)
- County of Residence:** ADA (Callout 5)
- Admission Date:** 6/17/2016
- Discharge Date:** 6/17/2016
- Follow Up Date:** 06/27/2016 (Callout 7)
- # of Mail-Out Attempts:** 4 (Callout 7)
- # of Telephone Attempts:** 2 (Callout 7)
- # of Face-to-Face Attempts:** 0 (Callout 7)
- # of Follow-Up Attempts:** 0 (Callout 7)
- Follow Up Status:** Unable to Follow-Up-Unable to Contact (Callout 6)
- Record Status:**
 - Record Created By: [Empty]
 - Last Updated By: [Empty]
 - Created Date: [Empty]
 - Last Updated Date: [Empty](Callout 8)

At the bottom, there are four buttons: **Cancel** (red), **Save** (green), **Finish** (blue), and a right arrow button (blue).

Create a Client Group Enrollment

1. Click Client Profile and Client Group Enrollment on the Navigation Pane (left menu).

NOTE: Create a new Client Group Enrollment each time you are billing for a 4th Unsuccessful Follow Up with a status of Unable to Contact.

The screenshot shows the 'Profile' form for a client named Anna Test22. The navigation pane on the left is expanded to 'Client Profile', which includes options like 'Alternate Names', 'Additional Information', 'Military Information', 'Contact Info', 'Collateral/Cust. Contacts', 'Other Numbers', 'History', 'Client Group Enrollment', 'Authorization', 'Employment', and 'Allergies'. A red circle with the number '1' and an arrow points to the 'Client Group Enrollment' option. The main form contains fields for personal information (First Name, Middle Name, Last Name, Suffix, Gender, DOB, SSN), identification (Provider Client ID, Unique Client Number, State Client ID), and administrative details (Record Created By, Last Updated By, Created Date, Last Updated Date). There are also fields for Driver's License, Access Category, and a checkbox for 'file'.

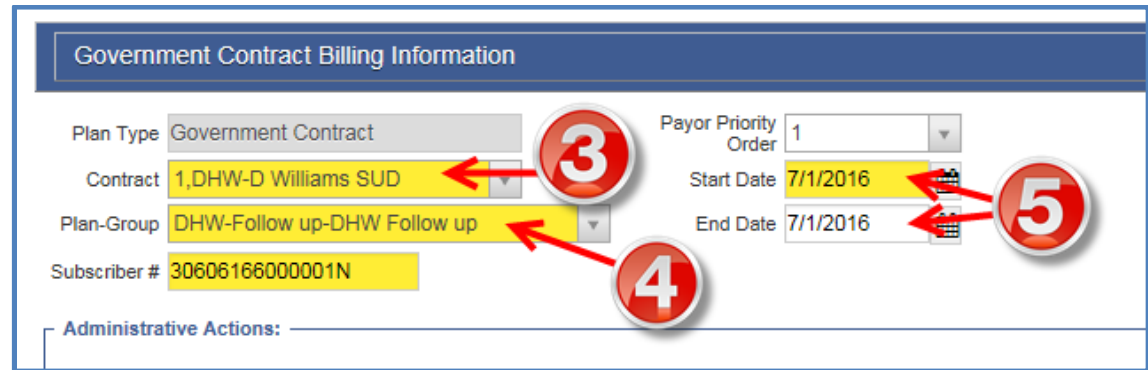
2. Click Add Government Contract Enrollment.

The screenshot shows the 'Payor List' table. The table has columns for 'Actions', 'Priority', 'Plan', 'Group', 'Contract', 'Subscriber/ Acct#', 'Subscriber/ Resp Party', 'Start Date', and 'End Date'. A red circle with the number '2' and an arrow points to the 'Add Government Contract Enrollment' button in the top right corner of the table.

Actions	Priority	Plan	Group	Contract	Subscriber/ Acct#	Subscriber/ Resp Party	Start Date	End Date
		State General	DHW Adult	DHW-D Williams SUD	3060616600001N		7/1/2015	6/30/2016

3. Select the Contract that starts with “DHW” or “IDJC” followed by your agency name
(whichever is applicable.)
4. Select DHW Follow up or IDJC-Follow Up as the Plan Group.
5. Enter the day you completed the Follow-Up as the Start and End Date.

6. Click  .



Government Contract Billing Information

Plan Type: Government Contract

Contract: 1,DHW-D Williams SUD

Plan-Group: DHW-Follow up-DHW Follow up

Subscriber #: 30606166000001N

Payor Priority Order: 1

Start Date: 7/1/2016

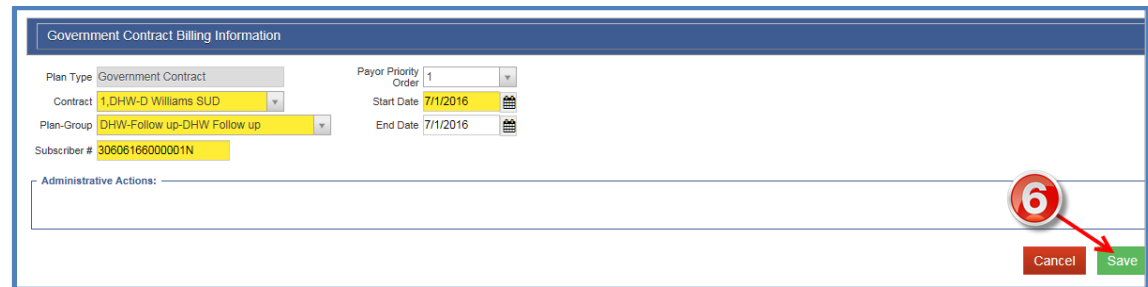
End Date: 7/1/2016

Administrative Actions:

Callout 3 points to the Contract dropdown menu.

Callout 4 points to the Plan-Group dropdown menu.

Callout 5 points to the Start and End Date fields.



Government Contract Billing Information

Plan Type: Government Contract

Contract: 1,DHW-D Williams SUD

Plan-Group: DHW-Follow up-DHW Follow up

Subscriber #: 30606166000001N

Payor Priority Order: 1

Start Date: 7/1/2016

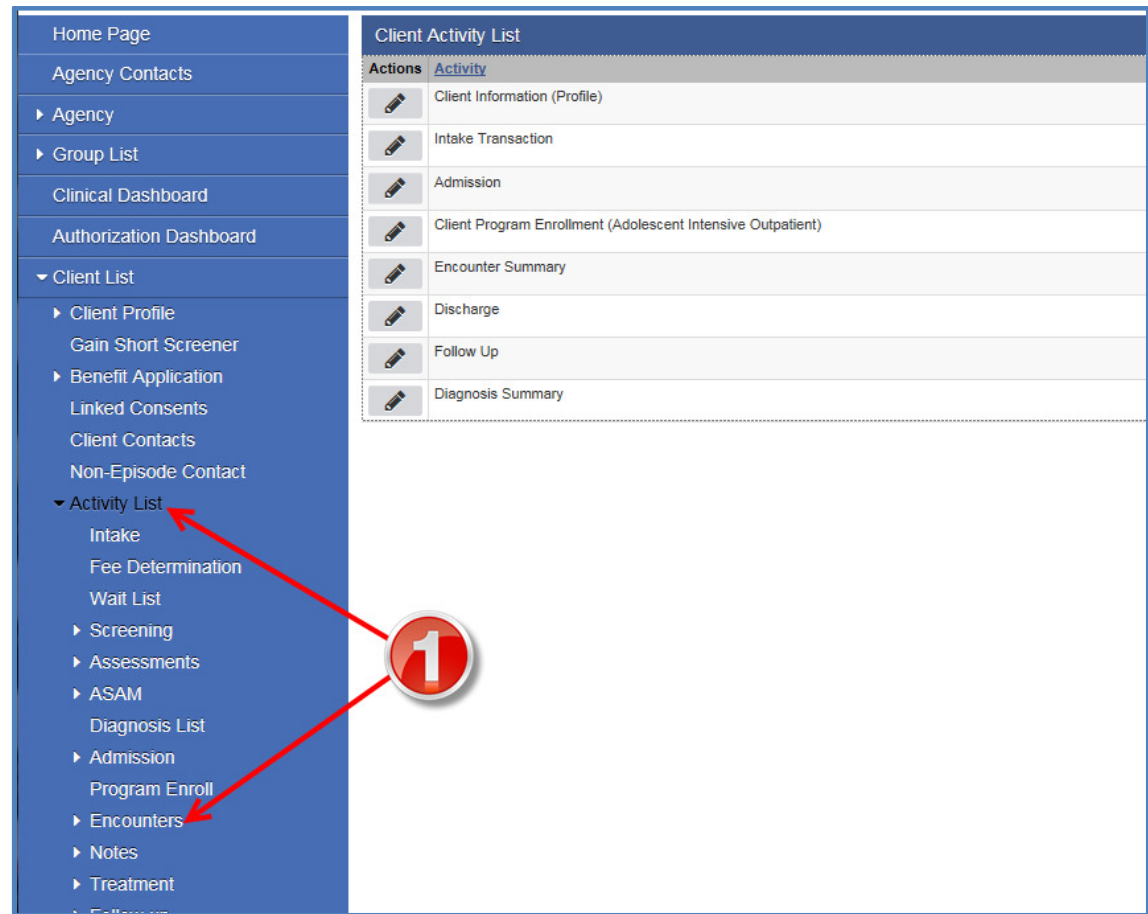
End Date: 7/1/2016

Administrative Actions:

Callout 6 points to the Save button.

Bill for Unsuccessful Follow Up Survey Attempts (Create an Encounter)

1. Click **Activity List** and **Encounters** on the Navigation Pane.



The screenshot shows the navigation pane on the left and the Client Activity List on the right. The navigation pane has a blue background with white text. The Client Activity List has a blue header and a white body. A red circle with the number 1 is placed over the 'Encounters' link in the navigation pane, with arrows pointing to it from the 'Activity List' and 'Encounters' links.

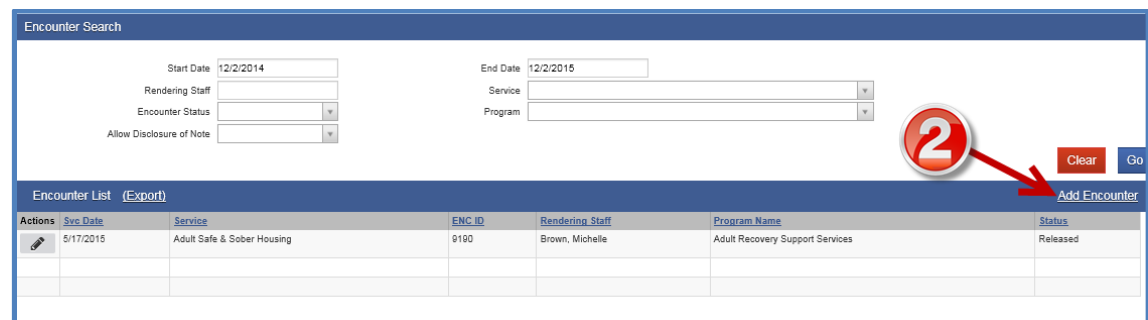
Navigation Pane:

- Home Page
- Agency Contacts
- ▶ Agency
- ▶ Group List
- Clinical Dashboard
- Authorization Dashboard
- ▼ Client List
 - ▶ Client Profile
 - Gain Short Screener
 - ▶ Benefit Application
 - Linked Consents
 - Client Contacts
 - Non-Episode Contact
 - ▼ Activity List
 - Intake
 - Fee Determination
 - Wait List
 - ▶ Screening
 - ▶ Assessments
 - ▶ ASAM
 - Diagnosis List
 - ▶ Admission
 - Program Enroll
 - ▶ Encounters
 - ▶ Notes
 - ▶ Treatment

Client Activity List:

Actions	Activity
	Client Information (Profile)
	Intake Transaction
	Admission
	Client Program Enrollment (Adolescent Intensive Outpatient)
	Encounter Summary
	Discharge
	Follow Up
	Diagnosis Summary

2. Click **Add Encounter**.



The screenshot shows the Encounter Search and Encounter List. The Encounter Search section has a blue header and a white body. The Encounter List has a blue header and a white body. A red circle with the number 2 is placed over the 'Add Encounter' button in the Encounter List, with an arrow pointing to it from the 'Add Encounter' button in the Encounter Search section.

Encounter Search:

Start Date: 12/2/2014 End Date: 12/2/2015

Rendering Staff: Service: Program:

Encounter Status: Allow Disclosure of Note:

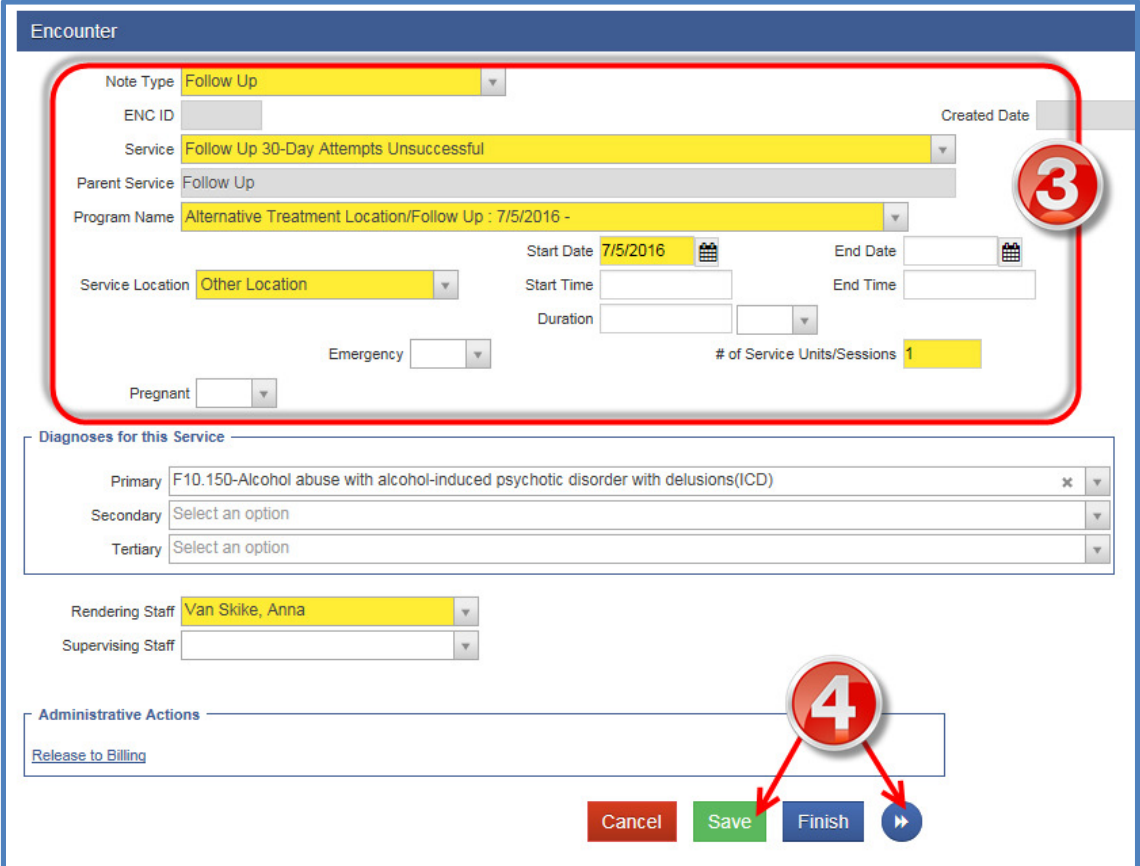
Encounter List (Export):

Actions	Svc Date	Service	ENG ID	Rendering Staff	Program Name	Status
	5/17/2015	Adult Safe & Sober Housing	9190	Brown, Michelle	Adult Recovery Support Services	Released

3. Complete the following:

- Select **Follow Up** as the **Note Type**
- Select the **Service** of **Follow Up 30-Day Attempts Unsuccessful**, **Follow Up 6-Month Attempts Unsuccessful**, or **Follow Up 12-Month Attempts Unsuccessful**
- Enter the **Start Date**
- Select the **Service Location**
- **Enter 1** for the **# of Service Units/Sessions**.

4. Click  and .



Encounter

Note Type **Follow Up**

ENC ID

Created Date

Service **Follow Up 30-Day Attempts Unsuccessful**

Parent Service **Follow Up**

Program Name **Alternative Treatment Location/Follow Up : 7/5/2016 -**

Service Location **Other Location**

Start Date **7/5/2016**

End Date

Start Time

End Time

Duration

Emergency

Pregnant

of Service Units/Sessions **1**

Diagnoses for this Service

Primary **F10.150-Alcohol abuse with alcohol-induced psychotic disorder with delusions(ICD)**

Secondary **Select an option**


Tertiary **Select an option**

Rendering Staff **Van Skike, Anna**

Supervising Staff

Administrative Actions

[Release to Billing](#)

Cancel **Save** **Finish** 

5. Enter a note in the Unsigned Note section.

NOTE: Document the four methods used to attempt to contact client.

6. Click Sign Note.

7. Click Save.

8. Click Release to Billing.

NOTE: When the Encounter Releases to Billing, WITS will prompt you to close the case (Intake).

9. Select Yes when prompted to close the case.

NOTE: WITS will automatically close the Follow Up Program Enrollment when the Intake is closed.

The screenshot displays the WITS interface with the following elements and numbered callouts:

- Signed Notes:** A greyed-out section at the top.
- Unsigned Notes:** A section containing a text area labeled "notes".
- Callout 5:** Points to the "Enter notes" text area.
- Callout 6:** Points to the "Sign Note" button.
- Callout 7:** Points to the "Save" button.
- Callout 8:** Points to the "Release to Billing" link under the "Administrative Actions" section.
- Buttons:** "Cancel", "Save", "Finish", "Add Note", and "Sign Note".
- Form Elements:** "Allow Disclosure" dropdown set to "No".

The screenshot shows a prompt with the text: "Encounter has been released to billing. Do you want to close this case also?". Below the text are two buttons: "Yes" and "No". A red callout circle with the number 9 points to the "Yes" button.